

CMC Meeting February 27, 2012 – MSL Grizzly Room

Meeting convened at 9:15 am. Roberta Gebhardt volunteered to take notes.

Members attending: Janice Kalvig, Laura Tretter, Carrie Nelson, Marilyn Trosper, Nancy Venable, Lois Dissly, Dave Shearer, Carly Delsigne, Roberta Gebhardt.

Members absent: Donna Worth and Paulette Parpart.

MSC Staff attending: Ken Adams, Melody Condron, and Amy Marchwick. Guests: Beth Downs.

1. RDA--How is it going to affect us? (Roberta, Melody)

Roberta talked briefly about the Library of Congress RDA page and that LOC has announced that it will be transitioning completely to RDA in the first quarter of 2013. Melody talked briefly about the information she has found on RDA on the SirsiDynix website. A major concern of the MSC is the move away from GMD's and to the RDA Carrier Descriptions. How are we going to deal with the new records that do have a GMD? What can eLibrary display for the user? Recommendation was made to keep adding the GMD to records for now. Once we are closer to an RDA implementation date we can look at the possibility of converting all the GMD's to the RDA carrier description elements. Roberta will e-mail Bob Maxwell at BYU and see what they are doing with their SirsiDynix system to display the carrier description elements. (See end of minutes for Bob's response).

Roberta shared two resources she found for updating RDA CIP records. This committee will create a new simple guide for this process for the cataloging guidelines.

<http://www.library.yale.edu/cataloging/Orbis2Manual/CIP1RDA.htm>

<https://www1.columbia.edu/sec/cu/libraries/inside/clio/docs/bcd/cpm/cpmbib/cpm252.html>

ACTION: Recommendation at this time is to keep adding GMD's to records. Melody will see if we can display the carrier description elements. Roberta will help Lois with the simple guide for updating RDA CIP records to be included in the Cataloging Guidelines.

2. Analytics

Amy has been giving webinars on analytics. She feels that this is going well and that we are making progress on getting some consistency in the analytics. Melody is working on batch changing all the V.1's to V._1. (_ is a space). She will be working in the test environment and will work with the sharing groups first. For now MSC staff is not recommending that people change these manually, especially if there are any holds involved. The batch changing seems to keep the holds intact, but manual change can cause ghost holds. They are also suggesting that

folks run a report of holds older than 2 months to see if any of these ghost holds are out there. Amy and Melody can run the report for people, they just need to call. Melody's goal is to have everything batch changed by the end of the year. As they work on this Amy and Melody will make recommendations to this committee about other ways that analytics can be cleaned up.

It has been determined that if people need to include the series number in the call number they should do so with a #, instead of the words No. The # does not create an analytic.

Discussion of analytics for Encyclopedia's, travel guides, atlases. Which year to use, year in title or year of publication or copyright. Most felt that the year in the title should be used in the call number.

Paulette has updated the Backroads of Montana records. With the constant need to move new libraries to the serial record, it was decided to bring in records for each episode individually. Everything that could be identified as belonging to a certain episode was moved. Melody will work with remaining libraries to get their holdings moved to the correct record.

ACTION: Melody and Amy will continue working on batch changes. Amy will send out e-mail about webinar recordings. Melody and Amy will continue to make recommendations to this committee on what else needs to be done with analytics.

3. What tags need to be indexed? (Roberta)

It was discovered that the changes suggested by this committee last year were only applied to the Book format. There are several tags that need to be added to the Visual Materials format. After some discussion it was decided that these tags should be added to ALL formats. Roberta will send out a list to the group and include whether they need to be indexed in both the browse and keyword index.

Tags needing indexing are 544, 561, 655, 245 N and P, 513. Ken will have Mike implement these on the test server first to see how long the indexing takes. He thinks it will be about 8 hours. We may be able to do this over a weekend. Or we may need to wait until we do the annual Authority maintenance index. The Authority work has been delayed from April to July.

ACTION: Roberta will send out e-mail with tags. Indexing will be completed on test server first.

4. Monthly tips (Carly)

Ken mentioned that he has always gotten positive feedback about the monthly tips. Carly mentioned that the tips can function as a community builder. She also suggested that we can link to the great work that Amy and Melody have done. She also feels it is important for people to know who is on this committee and these tips do that. It also gives people someone to ask about specific things. Carly will remind people that their tip is due the month before it is. She

will try to keep us on track. Submit your tip to this group for review and then post to MSC Discuss. Ken will grab it and put it on the blog. Decided not to call them monthly tips, just MSC Tips. We need to work on getting more Circ and OPAC tips.

Carrie	BluRay and DVD combo packs	March
Dave	Right click expand and collapse	April
Roberta	# in call number for series titles	May
Lois	2 month hold report	June
Marilyn	Use of Public, Staff and Circ notes	July
Janice	New Cataloging Guidelines	August
Nancy	AR and Lexile levels	September
Laura	856 tags	October
Lois	Item Search and Display for fines and holds	November
Carly	Showcasing trainings available from MSC website	December
Paulette	Travel guides	January
Marilyn	Receipt printer	February

ACTION: Carly will remind the next person in line that their tip is due.

5. Bib load & smartport match rules (Amy & Melody)

When reports broke in January of 2011, Ken asked everyone to re-create their batch bibload reports. There is currently no way to know if this has happened. If people did not recreate the report they may have the wrong settings. Amy proposes deleting all those batch bibload reports that were created before January 2011. Altering people to the fact that they have been deleted and helping them to recreate the bibload report with the correct settings.

We need to update the screenshot of SmartPort setting in the cataloging guidelines to include OPILS. Currently it only contains OP. Adding the ILS with the gadget will help add more checks before a record is brought in. It was also suggested that we explain what OPILS stands for. It may make more sense to people that way.

ACTION: Amy will work on removing the old batch bibload reports. Lois will update the screenshots of SmartPort settings for the guidelines.

6. Cataloging cleanup--Ken wants to start again in April. It would be nice if we could give input as to the best method to use for cleanup. (Ken, Janice, Melody)

The Executive Committee has approved money to start working on a cleanup project. Westaff will be used to pay those working on this. No state employees can apply to work on this project. Ken has discovered a new way to run reports for this and thinks it will be much easier. The report will include duplicate OCLC numbers in the 035 and duplicate titles. The whole catalog will be included in the reports.

Ken has also started giving new libraries their reports of items that were loaded without a match. Stillwater is working on theirs now. They had 160 pages, but they are on page 80. It is a great way to teach folks how to transfer. Amy is working on a webinar on transferring.

The cleanup is necessary to help us migrate to a new system if we have to.

7. OPAC display--Any problems?

Is there a way to add an exact search to the OPAC? User education can help reduce the need for an exact search. Browse vs. keyword searching needs to be taught to users. Also when to do a title search vs. a broad keyword search.

EDS search box on individual websites. It is a great way to get users to all the resources, including databases. Only drawback so far involves patron access to their accounts and placing holds.

Icons and item types. There is still some confusion over which item type to use and which icon is created. If you use videorec now it shows a VHS tape. If you use DVD it shows a DVD. It was suggested that a chart of item types and icons be added to the cataloging guidelines to help with this issue. The other item type that causes problems is audiorec. It produces an icon of a cassette tape. Sharing groups are using CD Book or CD Circ to get a CD to appear as the icon.

BluRay/DVD combo packs – refer to Cataloging guidelines page 20 for examples of what analytic to use to identify these.

Serial Control set-up and OPAC display issues. For libraries that are using serials control, there needs to be some sort of maintenance guidelines set-up. Many people are not aware of what the display looks like for the users. We need to find a way to get holdings collapsed to control what displays. There are also issues with 856 displays in relation to serials when more than one library holds an electronic version from a different vendor or needs to use a password to access the resource.

856 display issues. Why does the |z sometimes replace the |u with a text string? How can we make this more consistent across the consortium? See number 9 below for more information on this issue.

It was asked if Mike could strip junktags from bib records in the catalog. We would like the following tags removed and then added to the junktag list for possible immediate removal when a record is brought in: 938, 952, 029. We do need to check with Missoula first about which tag they use for their DVD self check machine.

ACTION: Follow up with Missoula on which tag they need for their DVD self check machine. (Janice?)

8. More agents? Do we need agents? More mentors? (Ken, Janice)

Janice is questioning why we need to have the Agent/Client relationship set up if there is already access to everyone to Connexion. The Agent/Client program involves lots of MSC libraries but does not fall under the direction of the MSC. Questions should be directed to Sarah McHugh.

We talked about adding layers into the mentoring grid. For example, Marilyn is a mentor, but she also is mentored by Roberta. If we have more of these layers we could get more mentors. Carly and Laura volunteered to be mentors. Lois offered to take a few more libraries to share between her and Beth.

ACTION: Melody will work on updating the Mentor list. Janice will get clarification on Agent/Client program.

9. Cataloging guidelines review

Set date to get next revision done by – Guidelines should be done by August.

Electronic resources & 856s (Laura)

A subcommittee of Laura, Roberta, Melody and Amy has been set up to look at this issue. It was suggested that they start with Mike Price to see what the display settings are now and see what we can do to make this more consistent. Ken also mentioned that whatever vendor is picked, the new system will include ERM (Electronic Resource Management) and should help eliminate some of these issues. The committee will meet soon and make recommendations back to the group.

Serial vs. nonserial bib use

Serial records usually appear at the end of a results list because the date is not complete, ie. 19uu or the bib is old. Results pull the date from the fixed fields. Roberta wondered if you could change the date in the fixed fields to get the results to appear at the top of the list for items like travel guides. Melody will investigate. This is mostly a sharing group issue. Those groups need to decide how they want to approach these items as a group. We might need clarification in the cataloging guidelines about when a serial record should be used vs. a non-serial record. There are pros and cons for each. The Backroads of Montana is a great example where we tried to use the serial record but just couldn't get people to understand how to do it. Moving to the individual record for each episode will help users place holds more easily. We might want to add specific types of titles that should stay on a serial record (travel guides) and those that can be on individual records (World Almanac).

Amy asked if she could reformat the guidelines and make them more dynamic. Yes!

ACTION: Guidelines need to be updated by August. Amy will reformat the on-line document for the guidelines. Janice will talk to the Partners group about serial vs. nonserial bibs.

Possibly add a section to the Cataloging Guidelines that tell when to use a serial bib vs. a non-serial bib.

10. Other, if time:

MSC RFP responses. 5 vendors responded. Committee will meet on March 5th to go over all responses. Up to 4 will be asked to do a live presentation of the systems on March 26th. This is an open meeting and will be on-line. Each person on the RFP Committee can ask 2 people to look at the vendors products right now. After the meeting on March 5th the login information will be sent out to the whole MSC for review. Basically, there will be this long process and then there will be a recommendation to the MSC Membership at the Spring Meeting. There will also be a vote at that time. That vote will be sent on to the State Library Commission in June for a new contract that starts July 1.

Flathead County is about to start using 9XX ordering. She mentioned that there may be more vendor bibs in the catalog. Billings is also using this. Dave mentioned that lots of times there are several libraries that have attached holdings to the vendor bibs. He replaces the bib with a good bib when the items come in. People attaching to the bibs, or overlaying the bibs do not cause any problems.

11. Election of a new vice-chair.

Lois Dissly offered to be the vice chair for next year.

Wrap-up, good-bye

Addendum:

Bob Maxwell's response to questions about GMD's and RDA Carrier Descriptions

We do display GMDs in our catalog, both in the displays of AACR2 records and in the index, and patrons do use them in the index, for example, to find the movie version of Gone with the wind vs. the novel (or at least librarians say they do). We're planning to transition away from GMD use, with a possibility of replacing them all with the new RDA elements if we can figure out a way to do it programmatically, but that's no doubt a long way in the future. So for a while we've accepted that our catalog will be a mixed bag.

We're remedying the index problem of lack of GMD in RDA records by displaying the carrier type in the results list. So when a patron does a search for "Shadows in flight", which exists both in an audio version and in a book version, the RDA records display thus (see no. 2):

Catalog Browse Results: "shadows in flight"

1.	Shadows in bronze : a Marcus Didius Falco novel /	1
2.	Shadows in flight /	3
3.	Shadows in my hands : a Southwestern odyssey /	1
4.	Shadows in paradise /	2




If they records had been cataloged under AACR2 we would have had a display that went something like

- 2. Shadows in flight ...
- 3. Shadows in flight [sound recording] ...

Our remedy is to display the carrier type when the user clicks through to the next level of index after choosing "Shadows in flight" (see "audio disc" in no. 2 below, which is displaying from the carrier type field). The icons also help where available, and they're generated from among other things the carrier type field in the record:

Search Results

"Shadows in flight /" search found 3 titles.

-
- | | | | |
|----|---|---|-------------------------------|
| 1. |  | <p>Shadows in flight <i>Uncorrected advance reading copy.</i></p> <p>Card, Orson Scott, author.</p> <p>2012</p> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"><p>PZ 4 .C178 S535 2012b</p><p>1 copy available at HBLL Special Collections in Americana Collection - 1130 HBLL</p></div> | <input type="checkbox"/> Mark |
|----|---|---|-------------------------------|
-
- | | | | |
|----|---|---|-------------------------------|
| 2. |  | <p>Shadows in flight <i>Unabridged.</i></p> <p>Card, Orson Scott, author.</p> <p>audio disc</p> <p>2011</p> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"><p>PZ 4 .C178 S535 2012c</p><p>1 copy available at HBLL Special Collections in Americana Collection - 1130 HBLL</p></div> | <input type="checkbox"/> Mark |
|----|---|---|-------------------------------|
-
- | | | | |
|----|--|---|---|
| 3. |  | <p>Shadows in flight <i>First edition.</i></p> <p>Card, Orson Scott, author.</p> <p>2012</p> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"><p>PZ 4 .C178 S535 2012</p><p>1 copy available at HBLL Special Collections in Americana Collection - 1130 HBLL</p><p>Copies on order</p></div> | <div style="background-color: #005596; color: white; padding: 2px 5px; border-radius: 3px;">Place Hold</div>
<input type="checkbox"/> Mark |
|----|--|---|---|

Then when the patron clicks through to the record itself he/she can see the “types” displayed (labeled “content type”, “medium”, and “format”):

Item Details

☐ Mark



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Shadows in flight

Card, Orson Scott, author.

Bibliographic Information

Personal Author:	Card, Orson Scott, author.
Title:	Shadows in flight / Orson Scott Card.
Edition:	Unabridged.
Publication info:	New York : Macmillan Audio, [2011]
Physical description:	6 audio discs (7 hr.) : digital ; 4 3/4 in.
Content type:	spoken word
Medium:	audio
Format:	audio disc
General Note:	Compact disc.
General Note:	Title from container.
General Note:	In container (17 cm).
General Note:	"Includes a bonus video interview with Orson Scott Card"--Container.
General Note:	Sequel to: The shadow of the giant.
Note:	Read by Stefan Rudnicki and a full cast.
Summary:	Bean moves with three of his children into a derelict space colony ship, genes that give them high intelligence and short lives, a situation that cause them to be forgotten by humanity.
Subject term:	Space ships--Fiction.
Subject term:	Space colonies--Fiction.
Genre or Form:	Science fiction, American.
Genre or Form:	Audiobooks.
Added author:	Rudnicki, Stefan, 1945- narrator.
Added Author:	Macmillan Audio (Firm), publisher.
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